



Manage organizational change: the full report

Example: a 900-person insurer in Casablanca replacing paper claims with a digital system. All five stages, from the guided tour.

The playbook at a glance

- 1** Who does the change affect?
Against the change, with the power to block it: **Staff representatives**
- 2** What is the plan for the whole organization?
A plan for all eight steps, starting with a case for why now
- 3** Where is each group stuck?
Stuck before Knowledge: **Claims handlers** and **Branch agents**. Don't train those groups yet
- 4** Who is pushing back, and why?
A response matched to each reason, and the plan changed where an objection was right
- 5** How do people let go of the old way?
Support planned for each phase, with the dip announced in advance

Who does the change affect?

Against the change, with the power to block it: **Staff representatives**

Can block it, and against it: **Staff representatives**

Manage closely: **Head of claims, IT director, Staff representatives and Claims team leads**

Keep satisfied: **The board's risk committee**

Keep informed: **Claims handlers and Branch agents**

Monitor: **Finance back office**

Most affected, least say: **Claims handlers and Branch agents: 240 people, 27% of the organization**

What this may mean

A powerful group that is against the change can stop it. If they first hear of it at the announcement, a disagreement turns into a public fight. Keep satisfied means keep them oriented, not leave them alone: a group with authority and no context tends to say no at sign-off. The people who have to change most have the least say. Hearing it from their own managers first, and someone they trust in the group leading the change, makes the difference.

Investigate next

Arrange to meet **Staff representatives** before anything is announced. Then plan the change in stage 2, Kotter's 8 Steps: the case for why now, and a guiding coalition that includes people the most affected groups trust.

Each group is placed by power (can it help or block the change?) and interest (how much does it care how this turns out?), on four levels so nobody sits on the line. "High" and "fairly high" count as high.

The quadrants: high power and high interest, manage closely; high power, low interest, keep satisfied; low power, high interest, keep informed; low on both, monitor.

"Most affected, least say" counts the groups whose daily work changes and whose power is fairly low or low.

What is the plan for the whole organization?

A plan for all eight steps, starting with a case for why now

Before you rely on this

- Nobody in the coalition is someone **Branch agents** already trust: people who have to change hear it best from one of their own.

Case for why now: **Made, with a figure, and the leaders agree**

Steps with an action: **8 of 8**

Guiding coalition: **4 people: 2 senior leaders, 2 trusted by the people most affected**

Against it, with the power to block: **Staff representatives: Met already**

Announcement: **In 28 days**

What this may mean

The order matters: the case, the coalition and the vision come before the announcement; then the steps run for months. Creating urgency and removing obstacles never stop after their first round. People the most affected trust are in the coalition: their word carries more weight than any memo.

Investigate next

Announce the change. Two to three weeks after, go to stage 3, ADKAR, and score where each group that has to change is stuck; then again each month while steps 5 to 7 run.

The case counts as made when it says what happens if nothing changes, gives the evidence with at least one figure, and the leaders agree on it. How it shows in people's own work is checked separately.

Step 2 counts as written once the coalition has a member. A coalition member counts as trusted when you ticked that the people most affected already trust them.

The groups most affected, and the powerful groups against the change, come from the stakeholder map in stage 1.

Where is each group stuck?

Stuck before Knowledge: **Claims handlers** and **Branch agents**.
Don't train those groups yet

Claims team leads: Stuck at Knowledge (3)

Claims handlers: Stuck at Desire (2)

Branch agents: Stuck at Awareness (2)

Stuck in different places: **3 different barrier points across 3 groups**

This check: **3 weeks after the announcement**

What this may mean

Training people who don't yet want the change is wasted: Knowledge can't move until Desire does. A Desire gap is rarely said out loud. It usually shows up as a technical complaint, a timing objection or a question about training. **Branch agents:** stuck at Awareness. They don't yet know why the change is happening; tell them, from someone they trust, with the business reason. The groups are stuck in different places, so one plan for all of them would miss most. Work on each group's barrier point only.

Investigate next

Take **Claims handlers** into stage 4: find the real reason behind the reluctance, and match the response to it. Act on the other barrier points now, and score again next month in this same file.

Each element is scored 1 (low) to 5 (high). The barrier point is the first element at 3 or less, in the fixed order Awareness, Desire, Knowledge, Ability, Reinforcement. A group above 3 on all five is through.

Score each group separately: an average across the organization hides groups stuck in different places.

Who is pushing back, and why?

A response matched to each reason, and the plan changed where an objection was right

Staff representatives: Expects to lose something: negotiation and agreement

Claims handlers: Sees it differently: participation and involvement. The objection holds up, and the plan changes, said publicly

Branch agents: Wasn't told, or doesn't trust what they were told: education and communication

Objections that held up: **1 of 3**

What this may mean

The same objection can come from fear for a job, a real flaw in the plan, or not having been told, and each needs a different answer. When an objection is right, changing the plan and saying so publicly builds trust faster than anything else. Defending a flaw to protect the plan costs far more credibility than fixing it. Where someone stands to lose, more explanation doesn't help: name the loss, and offer what protects what matters to them.

Investigate next

Carry out each response, then score the groups again in next month's ADKAR check (stage 3): Desire should move. Stage 5 plans support for the transition, including the dip in output.

The real reason decides the response. Answer the objection: if they keep coming back to the same point, check the plan, as they may be right. If they raise a new point each time, ask what they stand to lose. If it started after a broken promise, fix that first.

The responses run from slow and durable (education, participation, support) to fast and costly (negotiation, co-optation, coercion). Use the lightest one that answers the actual reason.

How do people let go of the old way?

Stage 5 diagnosis

Support planned for each phase, with the dip announced in advance

Before you rely on this

- Stuck before Knowledge at the last ADKAR check: **Claims handlers**. Transition support doesn't give people a reason or a wish to change: keep the ADKAR actions and the stage 4 responses going.

Ending: **Branch agents**

Neutral zone: **Claims handlers**

New beginning: **Claims team leads**

The dip: **About 15% for 3 months; targets lowered; announced in advance**

Support planned: **3 of 3 phases**

What this may mean

A change happens on a date; the transition, people actually working the new way, takes months, and each group moves at its own pace. People feel loss even when the old way was worse. Naming what is ending helps them let go of it. The neutral zone is where changes quietly fail: output dips, people miss the old routines, and leaders, who went through their own transition months earlier, lose patience. A dip announced in advance is a plan; one nobody expected looks like failure.

Investigate next

Track whether people are working the new way, not whether the system is switched on. Review at 3, 6 and 12 months after go-live, keep the monthly ADKAR check until every group is through, and make the new way permanent through hiring, promotion and the stories leaders tell.

The three phases overlap, and they are not stages to complete. Place each group where most of its people are now.

The dip is sketched from your numbers: output falls by the percentage you expect at go-live, recovers over the months you entered, and passes its old level after that. It is a plan to say out loud, not a forecast.

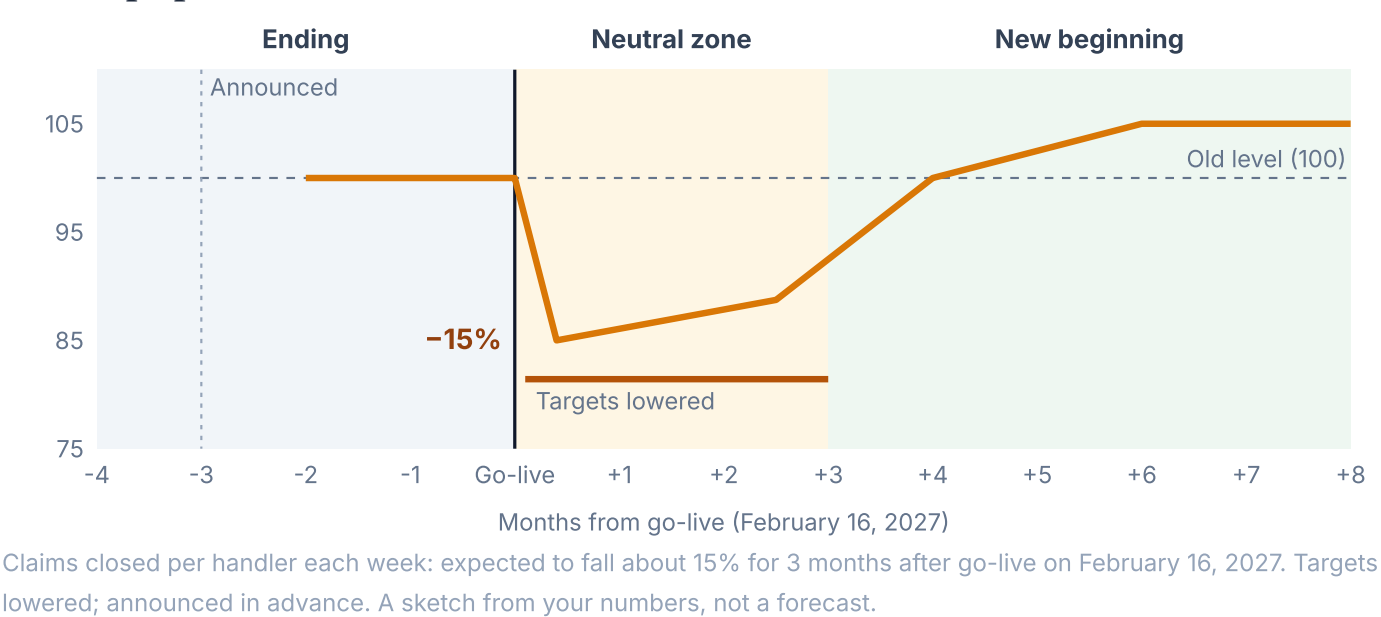
Where each group is now

Ending
Letting go of the old way and what it meant
Branch agents 60
Letting go of: a familiar routine, their say in how they work

Neutral zone
The old way is gone; the new one doesn't feel natural yet
Claims handlers 180
Letting go of: a familiar routine, standing or status, a familiar place or desk

New beginning
The new way starts to feel like how work is done
Claims team leads 18
Letting go of: a familiar routine

The dip, planned



Support for each phase

PHASE	WHO IS THERE NOW	YOUR PLAN
Ending	Branch agents	Name what is ending, group by group, and thank people for the old way
Neutral zone	Claims handlers	Lower targets for a set period and say so in advance; check in often; name someone people can ask without feeling slow; collect their ideas
New beginning	Claims team leads	Share early results and customer feedback on the new way, and give each person a clear part in it
Ideas from the neutral zone	Who collects them	A 20-minute slot in each weekly check-in for handlers to suggest changes to the new way

DECISION POINT

Announce the dip, then hold your nerve

Output is planned to fall about 15% for 3 months, then pass its old level. Leaders who went through their own transition months earlier tend to lose patience here: the plan is what keeps them steady.

How you'll know it stuck

Go-live is not the finish. Track whether people are working the new way, not whether the system is switched on.

The measure that shows people working the new way

Share of claims owned by one handler from start to finish

Today

0%

Target

90%

Reviews: **May 16, 2027** (3 months), **August 16, 2027** (6 months), **February 16, 2028** (12 months), counted from go-live on February 16, 2027. Put them in the diary now.

Made with the free Bridges' Transition Planner at whichframework.org/tools/bridges-transition.html. Figures are from your data; the diagnosis describes what such patterns often point to, not proven causes.